

NEED A PROGRAM WITH MEASUREABLE IMPACTS THAT CAN REALLY MAKE A DIFFERENCE FOR LOW TO MODERATE INCOME FAMILIES?

The IRS supports a volunteer tax preparation effort called VITA or Volunteer Income Tax Assistance. Nation-wide, low to moderate income taxpayers' fail to receive billions of dollars of earned tax credits each year.

- VITA helps insure that qualifying taxpayers receive the Earned Income Tax Credit (EITC)
- VITA can save qualifying taxpayers hundreds of dollars in preparation fees.
- VITA site education helps taxpayers avoid costly refund anticipation loans and utilizes teachable moments for making wise use of refunds
- VITA coalitions can provide the number of returns completed; total refunds received by filers; an estimate of tax preparation costs saved by filers, following every tax season each.
- Participation in a VITA coalition often introduces new clientele to Extension programs and resources.
- Participation in a VITA coalition typically strengthens existing partnerships and opens the door for new collaborations.

RESOURCES AVAILABLE

- Internal Revenue Service tax information www.irs.gov
Keyword search: Community Network
- The Center on Budget and Policy Priorities EITC Campaign Kits
www.cbpp.org
- Volunteer Income Tax Assistance (VITA) Site Locations 1-800-829-1040

BEST PRACTICES

- New Hampshire EITC Coalition
<http://www.nheitc.org>
- Missouri Taxpayer Education
<http://extension.missouri.edu/hes/taxed/national.htm>
- Utah Taxpayer Education
<http://extension.usu.edu/vita>
- CSREES Financial Security
<http://www.csrees.usda.gov/financialsecurity.cfm>
- Contact National Leadership Team Members



STRENGTHEN YOUR COMMUNITIES



Make
Volunteer Tax Preparation
and
Education
Part of Your
Extension Program

OPPORTUNITIES

- **Greeter** (Volunteer to greet individuals to VITA tax site.)
- **Site Host** (Provide a location for tax preparation during the tax season, January thru April 15.)
- **Educational Efforts** (Provide Financial education materials for distribution and/or teach financial education workshops as individuals are waiting for tax preparation to be completed.)
- **Tax Preparer** (Complete training and certification on Tax Wise software and volunteer time to prepare taxes at VITA tax site.)
- **Coalition Partner** (Establish or join a coalition to select VITA tax preparation sites, train volunteers to prepare taxes and greet individuals, market free tax preparation, provide financial education, collect and report data.)



NATIONAL LEADERSHIP TEAM

The Cooperative State Research Education and Extension Service (CSREES)-USDA, in partnership with Cooperative Extension, and the Internal Revenue Service collaborate to increase the availability of free income tax assistance and financial education programs to low and moderate income families in rural and urban America. Team members include:

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LEADERSHIP TEAM OBJECTIVES

- Increase the number of low-income working families in rural and urban areas who use free income tax preparation services and claim the Earned Income Tax Credit (EITC) and other tax credits.
- Maximize the value of tax refunds for EITC eligible families with children.
- Involve EITC recipients in Cooperative Extension financial education and asset building programs.
- Assist other Extension Professionals develop, implement, and evaluate tax preparation and education programs.